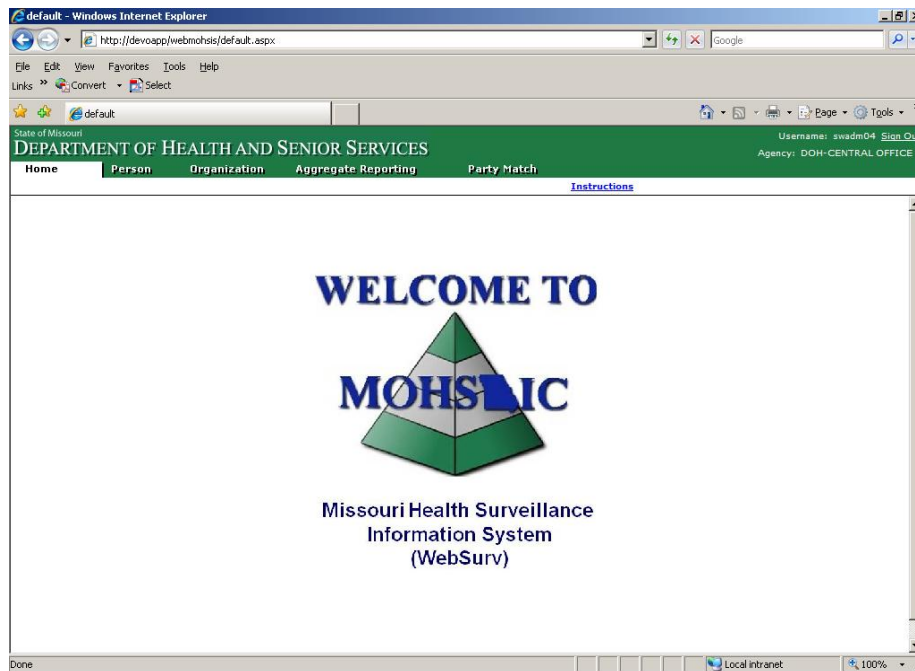


## QA 1 – Complete Party Match

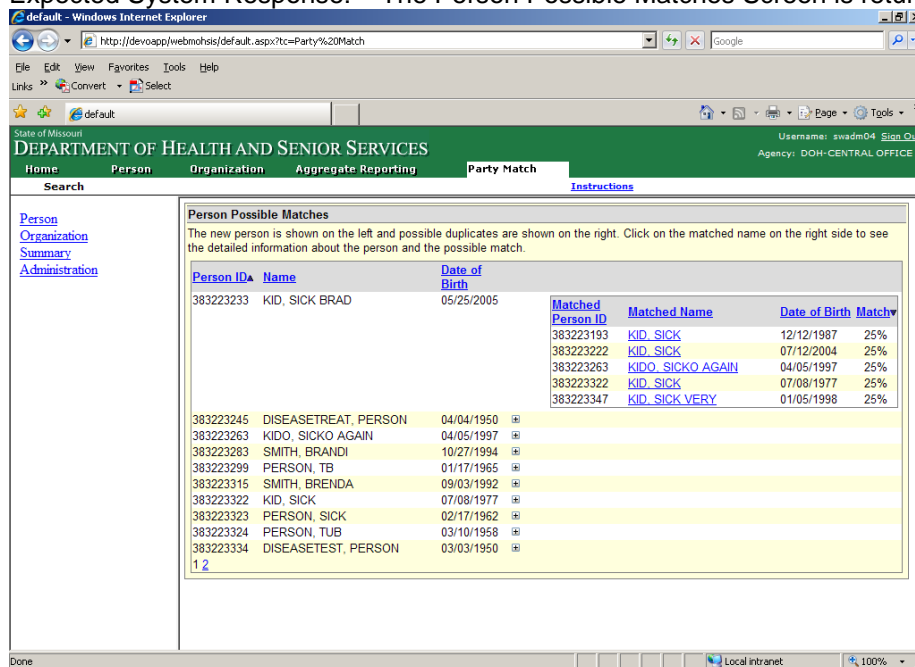
The following preconditions must be met:

1. Successful log into WebSurv application.



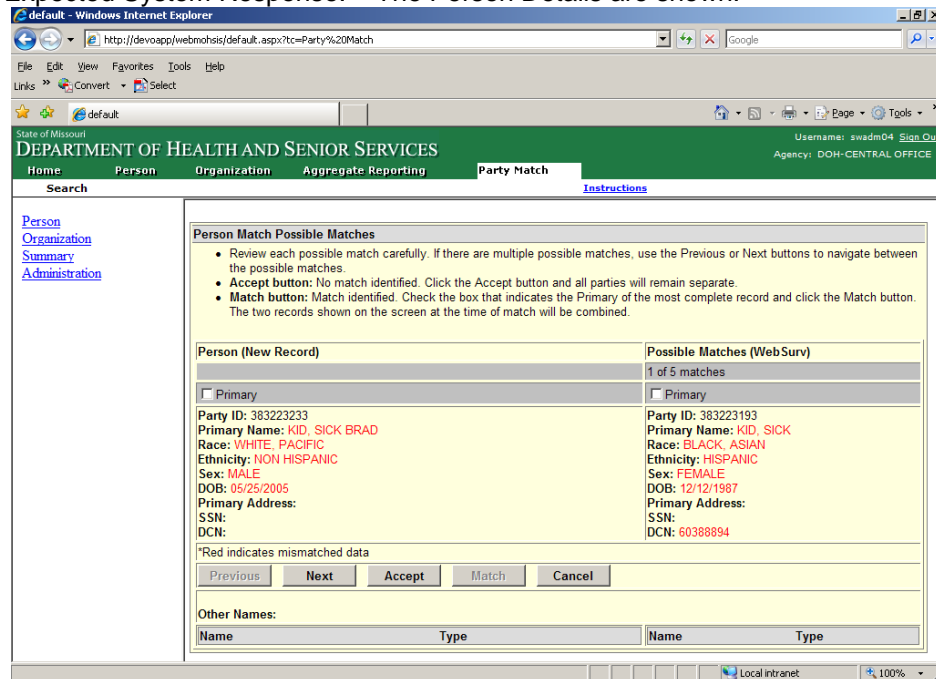
Procedure 1: Select Party Match on the Menu Bar

Expected System Response: The Person Possible Matches Screen is returned.



Procedure 2: Select the Matched Name in the right column.

Expected System Response: The Person Details are shown.



State of Missouri  
DEPARTMENT OF HEALTH AND SENIOR SERVICES  
Username: swadm04 Sign Out  
Agency: DOH-CENTRAL OFFICE

Home Person Organization Aggregate Reporting **Party Match** Instructions

Search

Person  
Organization  
Summary  
Administration

**Person Match Possible Matches**

- Review each possible match carefully. If there are multiple possible matches, use the Previous or Next buttons to navigate between the possible matches.
- Accept button:** No match identified. Click the Accept button and all parties will remain separate.
- Match button:** Match identified. Check the box that indicates the Primary of the most complete record and click the Match button. The two records shown on the screen at the time of match will be combined.

Person (New Record)	Possible Matches (WebSurv)
<input type="checkbox"/> Primary Party ID: 383223233 Primary Name: KID, SICK BRAD Race: WHITE, PACIFIC Ethnicity: NON HISPANIC Sex: MALE DOB: 05/25/2005 Primary Address: SSN: DCN:	1 of 5 matches <input type="checkbox"/> Primary Party ID: 383223193 Primary Name: KID, SICK Race: BLACK, ASIAN Ethnicity: HISPANIC Sex: FEMALE DOB: 12/12/1987 Primary Address: SSN: DCN: 60388894

\*Red indicates mismatched data

Previous Next Accept Match Cancel

Other Names:

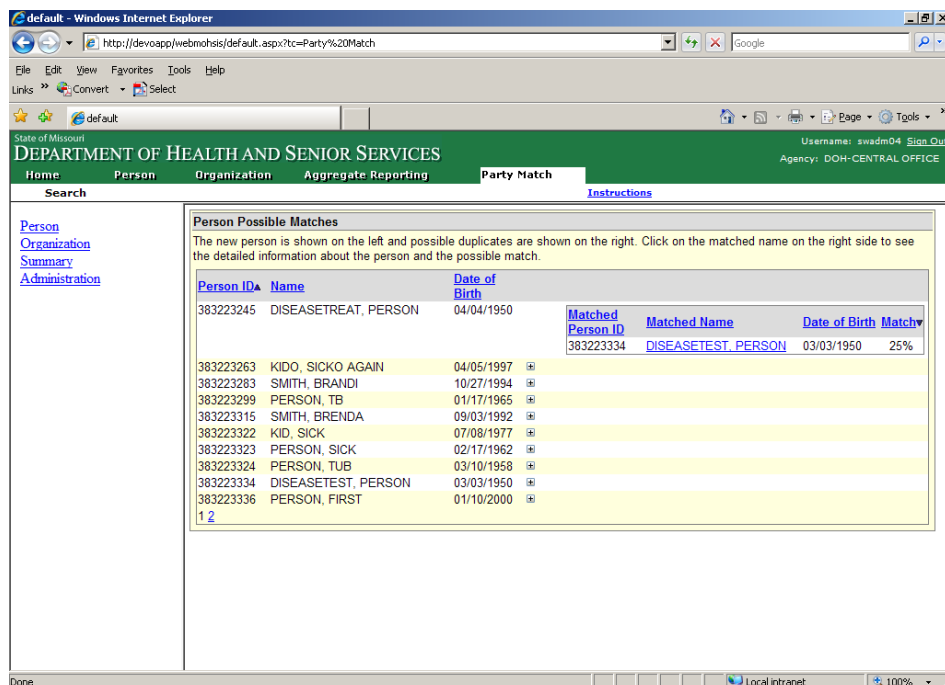
Name	Type	Name	Type

Local intranet 100%

NO MATCH IDENTIFIED.

Procedure 3: Click Next/Previous and review all the possible matches. Click ACCEPT button.

Expected System Response: Person Possible Matches Screen is returned. (The new record is accepted and removed from the screen.)



State of Missouri  
DEPARTMENT OF HEALTH AND SENIOR SERVICES  
Username: swadm04 Sign Out  
Agency: DOH-CENTRAL OFFICE

Home Person Organization Aggregate Reporting **Party Match** Instructions

Search

Person  
Organization  
Summary  
Administration

**Person Possible Matches**

The new person is shown on the left and possible duplicates are shown on the right. Click on the matched name on the right side to see the detailed information about the person and the possible match.

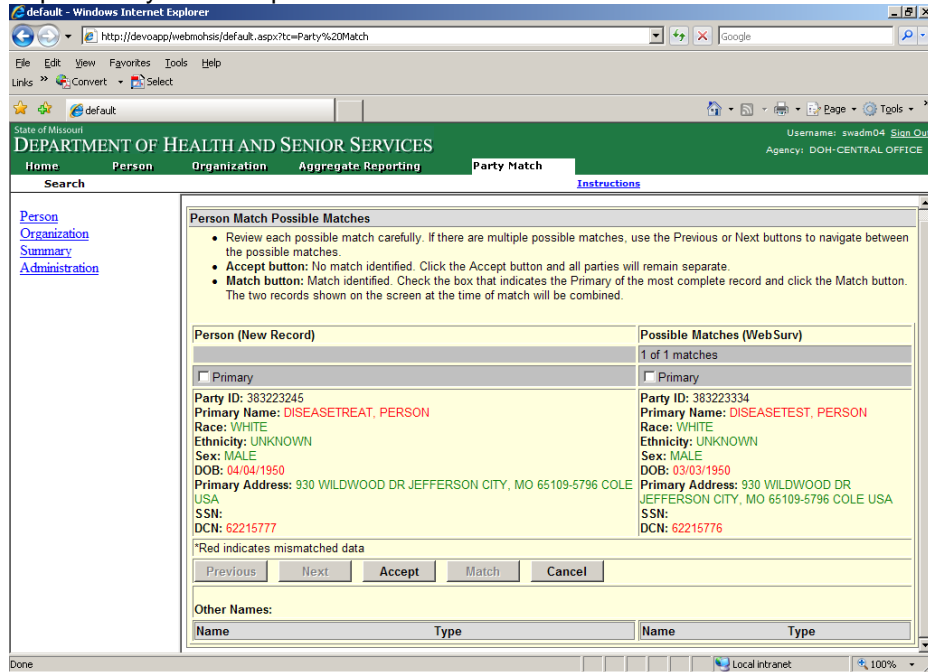
Person ID	Name	Date of Birth	Matched Person ID	Matched Name	Date of Birth	Match
383223245	DISEASETREAT, PERSON	04/04/1950	383223334	DISEASETEST, PERSON	03/03/1950	25%
383223263	KID, SICKO AGAIN	04/05/1997				
383223283	SMITH, BRANDI	10/27/1994				
383223299	PERSON, TB	01/17/1965				
383223315	SMITH, BRENDA	09/03/1992				
383223322	KID, SICK	07/08/1977				
383223323	PERSON, SICK	02/17/1962				
383223324	PERSON, TUB	03/10/1958				
383223334	DISEASETEST, PERSON	03/03/1950				
383223336	PERSON, FIRST	01/10/2000				

1 2

Local intranet 100%

Procedure 4: Click Matched Name in right column.

Expected System Response: The Person Details Screen is shown.



State of Missouri  
DEPARTMENT OF HEALTH AND SENIOR SERVICES  
Home Person Organization Aggregate Reporting Party Match Instructions

Search

Person  
Organization  
Summary  
Administration

Person Match Possible Matches

- Review each possible match carefully. If there are multiple possible matches, use the Previous or Next buttons to navigate between the possible matches.
- Accept button:** No match identified. Click the Accept button and all parties will remain separate.
- Match button:** Match identified. Check the box that indicates the Primary of the most complete record and click the Match button. The two records shown on the screen at the time of match will be combined.

Person (New Record)	Possible Matches (WebSurv)
<input type="checkbox"/> Primary	<input type="checkbox"/> Primary
<b>Party ID:</b> 383223245 <b>Primary Name:</b> DISEASETREAT, PERSON <b>Race:</b> WHITE <b>Ethnicity:</b> UNKNOWN <b>Sex:</b> MALE <b>DOB:</b> 04/04/1950 <b>Primary Address:</b> 930 WILDWOOD DR JEFFERSON CITY, MO 65109-5796 COLE USA <b>SSN:</b> 62215777 <b>DCN:</b> 62215777	<b>Party ID:</b> 383223334 <b>Primary Name:</b> DISEASETEST, PERSON <b>Race:</b> WHITE <b>Ethnicity:</b> UNKNOWN <b>Sex:</b> MALE <b>DOB:</b> 03/03/1950 <b>Primary Address:</b> 930 WILDWOOD DR JEFFERSON CITY, MO 65109-5796 COLE USA <b>SSN:</b> 62215776 <b>DCN:</b> 62215776

\*Red indicates mismatched data

Previous Next Accept Match Cancel

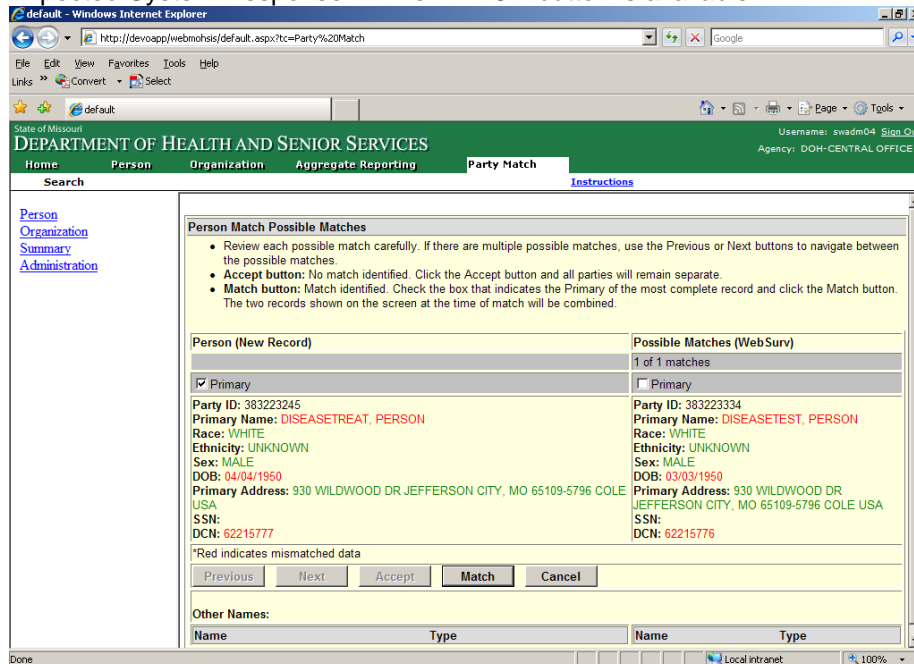
Other Names:

Name	Type	Name	Type

## MATCH IDENTIFIED

Procedure 5: Review the information, Click PRIMARY box on the top of the most complete record.

Expected System Response: The MATCH button is available.



State of Missouri  
DEPARTMENT OF HEALTH AND SENIOR SERVICES  
Home Person Organization Aggregate Reporting Party Match Instructions

Search

Person  
Organization  
Summary  
Administration

Person Match Possible Matches

- Review each possible match carefully. If there are multiple possible matches, use the Previous or Next buttons to navigate between the possible matches.
- Accept button:** No match identified. Click the Accept button and all parties will remain separate.
- Match button:** Match identified. Check the box that indicates the Primary of the most complete record and click the Match button. The two records shown on the screen at the time of match will be combined.

Person (New Record)	Possible Matches (WebSurv)
<input checked="" type="checkbox"/> Primary	<input type="checkbox"/> Primary
<b>Party ID:</b> 383223245 <b>Primary Name:</b> DISEASETREAT, PERSON <b>Race:</b> WHITE <b>Ethnicity:</b> UNKNOWN <b>Sex:</b> MALE <b>DOB:</b> 04/04/1950 <b>Primary Address:</b> 930 WILDWOOD DR JEFFERSON CITY, MO 65109-5796 COLE USA <b>SSN:</b> 62215777 <b>DCN:</b> 62215777	<b>Party ID:</b> 383223334 <b>Primary Name:</b> DISEASETEST, PERSON <b>Race:</b> WHITE <b>Ethnicity:</b> UNKNOWN <b>Sex:</b> MALE <b>DOB:</b> 03/03/1950 <b>Primary Address:</b> 930 WILDWOOD DR JEFFERSON CITY, MO 65109-5796 COLE USA <b>SSN:</b> 62215776 <b>DCN:</b> 62215776

\*Red indicates mismatched data

Previous Next Accept Match Cancel

Other Names:

Name	Type	Name	Type

Procedure 6: Click Match.

## WEBSURV TEST

Expected System Response: The Person Possible Matches Screen is returned. (The records are combined and removed from the screen.)

State of Missouri  
DEPARTMENT OF HEALTH AND SENIOR SERVICES

Home Person Organization Aggregate Reporting Party Match Instructions

Search

Person Possible Matches

The new person is shown on the left and possible duplicates are shown on the right. Click on the matched name on the right side to see the detailed information about the person and the possible match.

Person ID	Name	Date of Birth	Matched Person ID	Matched Name	Date of Birth	Match
383223263	KIDO, SICKO AGAIN	04/05/1997	383223193	KID, SICK	12/12/1987	25%
			383223222	KID, SICK	07/12/2004	25%
			383223233	KID, SICK BRAD	05/25/2005	25%
			383223322	KID, SICK	07/08/1977	25%
			383223347	KID, SICK VERY	01/05/1998	25%
383223283	SMITH, BRANDI	10/27/1994				
383223299	PERSON, TB	01/17/1965				
383223315	SMITH, BRENDA	09/03/1992				
383223322	KID, SICK	07/08/1977				
383223323	PERSON, SICK	02/17/1962				
383223324	PERSON, TUB	03/10/1958				
383223336	PERSON, FIRST	01/10/2000				
383223347	KID, SICK VERY	01/05/1998				
383223349	PERSON, SIX	02/17/1965				

## ORGANIZATION POSSIBLE MATCH

Procedure 7: Click Organization in the Treeview

Expected System Response: The Organization Possible Matches screen is returned.

State of Missouri  
DEPARTMENT OF HEALTH AND SENIOR SERVICES

Home Person Organization Aggregate Reporting Party Match Instructions

Search

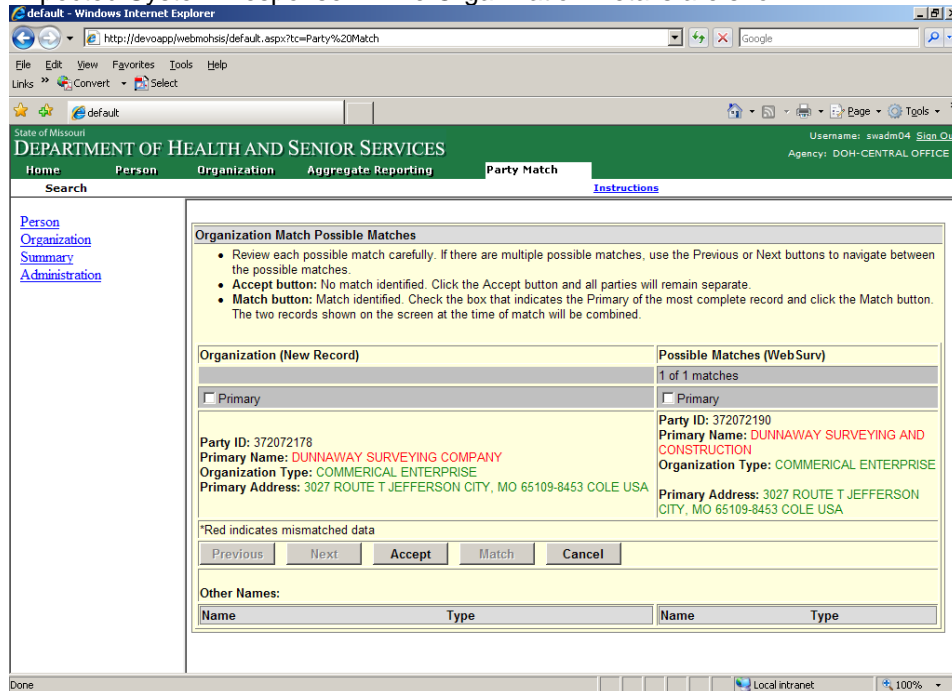
Organization Possible Matches

The new Organization is shown on the left and possible duplicates are shown on the right. Click on the matched name on the right side to see the detailed information about the Organization and the possible match.

Org ID	Name	Type	Matched Org Id	Matched Name	Type	Match
372072178	DUNNWAY SURVEYING COMPANY	COMMERICAL ENTERPRISE	372072190	DUNNWAY SURVEYING AND CONSTRUCTION	COMMERICAL ENTERPRISE	50%
372072190	DUNNWAY SURVEYING AND CONSTRUCTION	COMMERICAL ENTERPRISE				
372076315	EMERY SAPP AND SONS	COMMERICAL ENTERPRISE				
380543529	COLUMBIA REGIONAL HOSPITAL	HOSPITAL				
380543537	JEFFERSON CITY PUBLIC SCHOOLS	HOSPITAL				
380543544	EXCELSIOR SPRINGS HOSPITAL	HOSPITAL				
382052913	QUEST DIAGNOSTICS LENEXA	LABORATORY				
382886265	QUEST DIAGNOSTIC	LABORATORY				

Procedure 8: Click the Matched Name in the right column.

Expected System Response: The Organization Details are shown.



default - Windows Internet Explorer

http://devoapp/webmohsis/default.aspx?tc=Party%20Match

State of Missouri  
DEPARTMENT OF HEALTH AND SENIOR SERVICES

Home Person Organization Aggregate Reporting **Party Match** Instructions

Search

Person  
Organization  
Summary  
Administration

**Organization Match Possible Matches**

- Review each possible match carefully. If there are multiple possible matches, use the Previous or Next buttons to navigate between the possible matches.
- Accept button:** No match identified. Click the Accept button and all parties will remain separate.
- Match button:** Match identified. Check the box that indicates the Primary of the most complete record and click the Match button. The two records shown on the screen at the time of match will be combined.

Organization (New Record)	Possible Matches (WebSurv)
<input type="checkbox"/> Primary  Party ID: 372072178 Primary Name: DUNNWAY SURVEYING COMPANY Organization Type: COMMERCIAL ENTERPRISE Primary Address: 3027 ROUTE T JEFFERSON CITY, MO 65109-8453 COLE USA	1 of 1 matches  <input type="checkbox"/> Primary  Party ID: 372072190 Primary Name: DUNNWAY SURVEYING AND CONSTRUCTION Organization Type: COMMERCIAL ENTERPRISE Primary Address: 3027 ROUTE T JEFFERSON CITY, MO 65109-8453 COLE USA

\*Red indicates mismatched data

Previous Next **Accept** Match Cancel

Other Names:

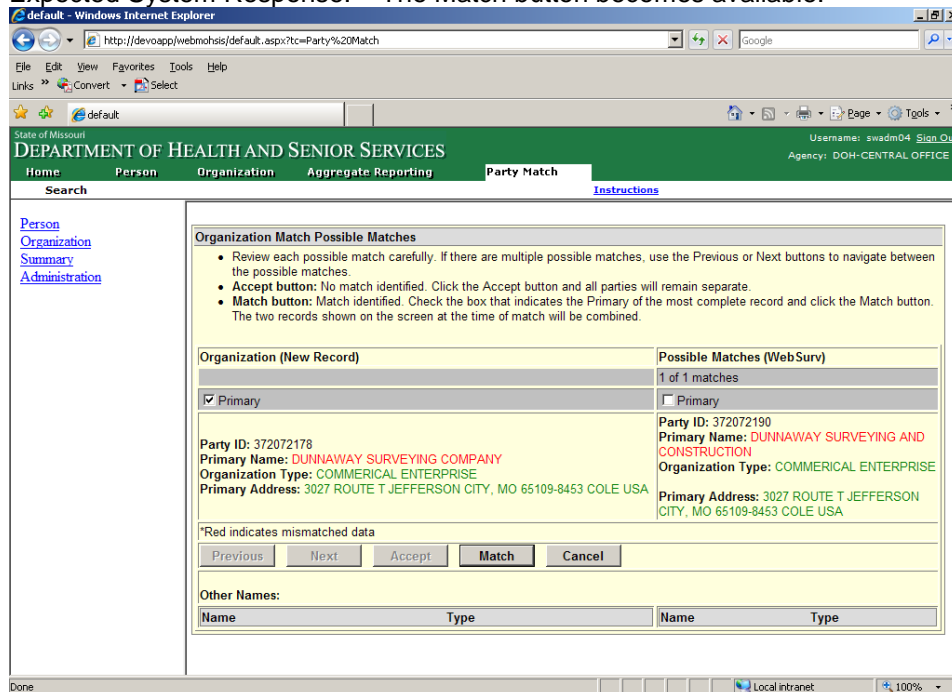
Name	Type	Name	Type

Done Local intranet 100%

MATCH IDENTIFIED

Procedure 9: Review all the possible matches. Click PRIMARY box above the most complete record.

Expected System Response: The Match button becomes available.



default - Windows Internet Explorer

http://devoapp/webmohsis/default.aspx?tc=Party%20Match

State of Missouri  
DEPARTMENT OF HEALTH AND SENIOR SERVICES

Home Person Organization Aggregate Reporting **Party Match** Instructions

Search

Person  
Organization  
Summary  
Administration

**Organization Match Possible Matches**

- Review each possible match carefully. If there are multiple possible matches, use the Previous or Next buttons to navigate between the possible matches.
- Accept button:** No match identified. Click the Accept button and all parties will remain separate.
- Match button:** Match identified. Check the box that indicates the Primary of the most complete record and click the Match button. The two records shown on the screen at the time of match will be combined.

Organization (New Record)	Possible Matches (WebSurv)
<input checked="" type="checkbox"/> Primary  Party ID: 372072178 Primary Name: DUNNWAY SURVEYING COMPANY Organization Type: COMMERCIAL ENTERPRISE Primary Address: 3027 ROUTE T JEFFERSON CITY, MO 65109-8453 COLE USA	1 of 1 matches  <input type="checkbox"/> Primary  Party ID: 372072190 Primary Name: DUNNWAY SURVEYING AND CONSTRUCTION Organization Type: COMMERCIAL ENTERPRISE Primary Address: 3027 ROUTE T JEFFERSON CITY, MO 65109-8453 COLE USA

\*Red indicates mismatched data

Previous Next Accept **Match** Cancel

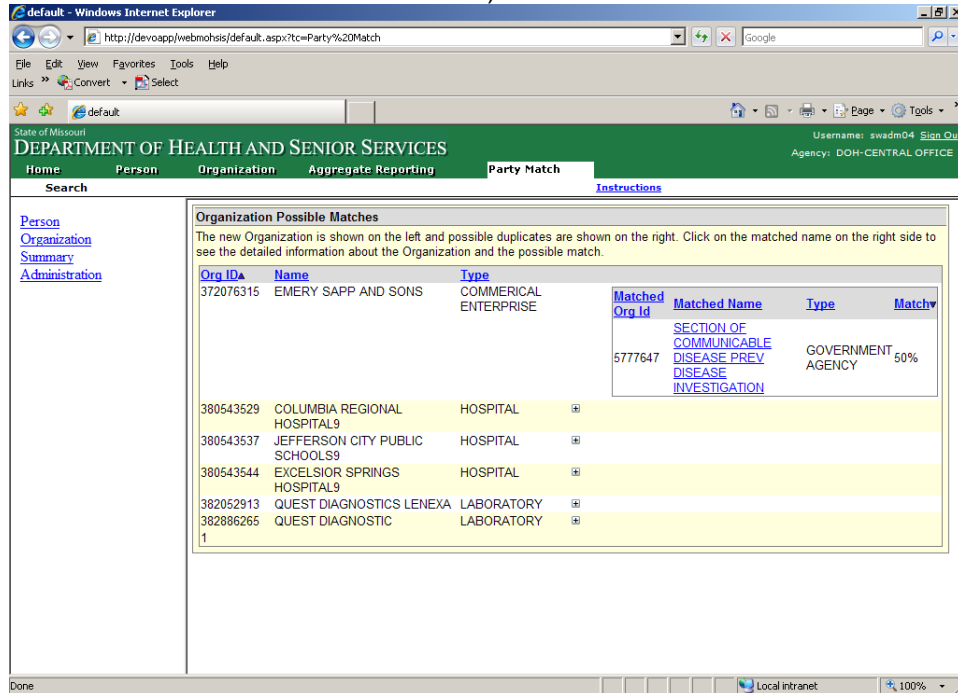
Other Names:

Name	Type	Name	Type

Done Local intranet 100%

Procedure 10: Click Match

Expected System Response: The Organization Possible Matches Screen is returned. (The records are combined and removed from the screen.)



State of Missouri  
DEPARTMENT OF HEALTH AND SENIOR SERVICES  
Home Person Organization Aggregate Reporting **Party Match** Instructions

Search

Person  
Organization  
Summary  
Administration

**Organization Possible Matches**  
The new Organization is shown on the left and possible duplicates are shown on the right. Click on the matched name on the right side to see the detailed information about the Organization and the possible match.

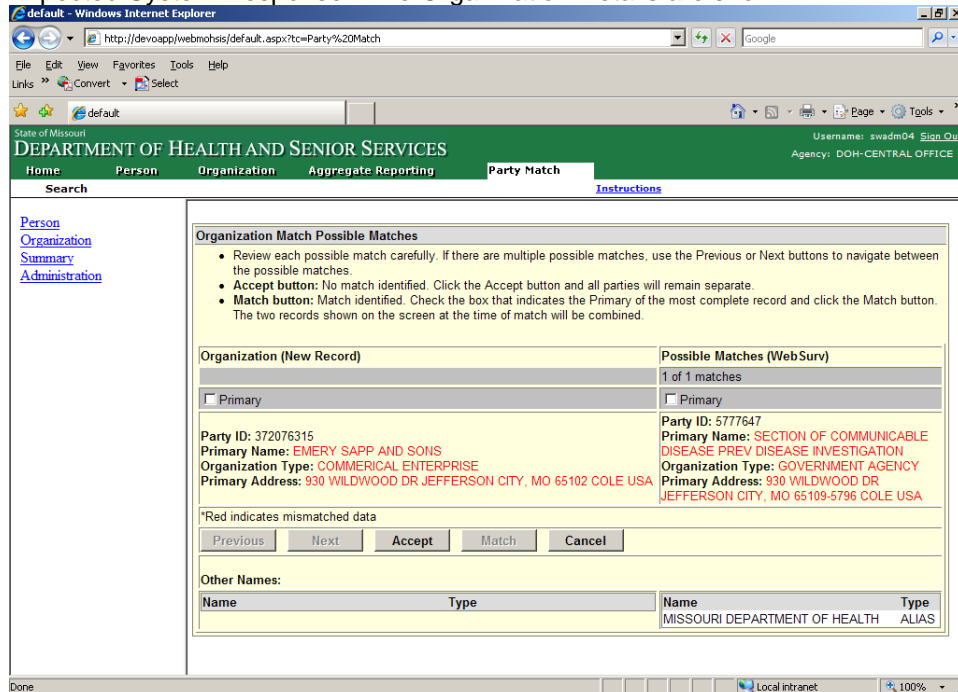
Org ID	Name	Type	Matched Org Id	Matched Name	Type	Match
372076315	EMERY SAPP AND SONS	COMMERICAL ENTERPRISE	5777647	SECTION OF COMMUNICABLE DISEASE PREV INVESTIGATION	GOVERNMENT AGENCY	50%
380543529	COLUMBIA REGIONAL HOSPITAL9	HOSPITAL				
380543537	JEFFERSON CITY PUBLIC SCHOOLS9	HOSPITAL				
380543544	EXCELSIOR SPRINGS HOSPITAL9	HOSPITAL				
382052913	QUEST DIAGNOSTICS LENEXA	LABORATORY				
382886265	QUEST DIAGNOSTIC	LABORATORY				

Done Local intranet 100%

NO MATCH IDENTIFIED

Procedure 11: Click on Matched Name in Right Column

Expected System Response: The Organization Details are shown.



State of Missouri  
DEPARTMENT OF HEALTH AND SENIOR SERVICES  
Home Person Organization Aggregate Reporting **Party Match** Instructions

Search

Person  
Organization  
Summary  
Administration

**Organization Match Possible Matches**

- Review each possible match carefully. If there are multiple possible matches, use the Previous or Next buttons to navigate between the possible matches.
- Accept button:** No match identified. Click the Accept button and all parties will remain separate.
- Match button:** Match identified. Check the box that indicates the Primary of the most complete record and click the Match button. The two records shown on the screen at the time of match will be combined.

Organization (New Record)	Possible Matches (WebSurv)
<input type="checkbox"/> Primary	1 of 1 matches
<b>Party ID:</b> 372076315 <b>Primary Name:</b> EMERY SAPP AND SONS <b>Organization Type:</b> COMMERICAL ENTERPRISE <b>Primary Address:</b> 930 WILDWOOD DR JEFFERSON CITY, MO 65102 COLE USA	<b>Party ID:</b> 5777647 <b>Primary Name:</b> SECTION OF COMMUNICABLE DISEASE PREV INVESTIGATION <b>Organization Type:</b> GOVERNMENT AGENCY <b>Primary Address:</b> 930 WILDWOOD DR JEFFERSON CITY, MO 65109-5796 COLE USA

\*Red indicates mismatched data

Previous Next Accept Match Cancel

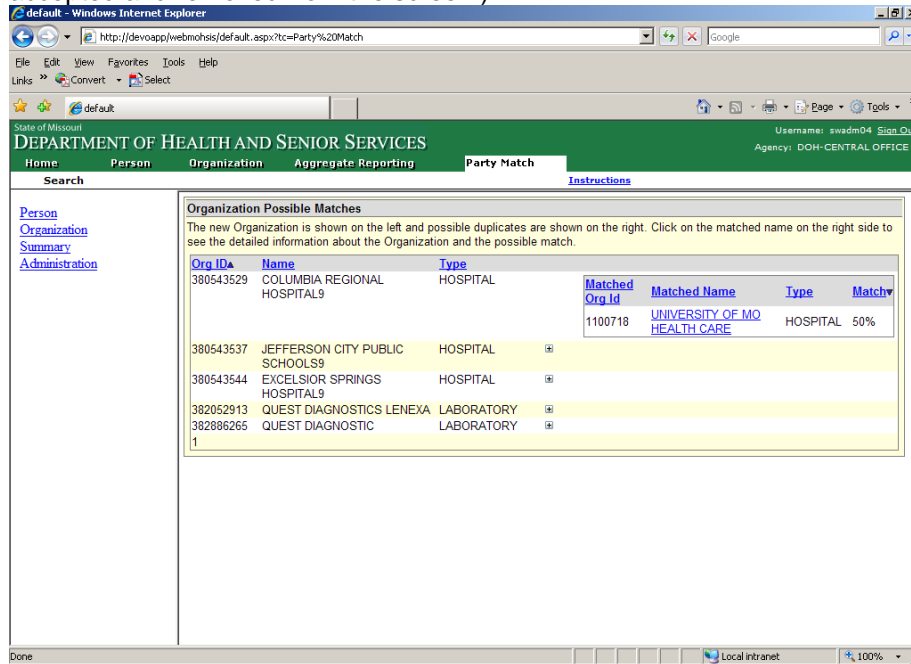
Other Names:

Name	Type	Name	Type
MISSOURI DEPARTMENT OF HEALTH	ALIAS		

Done Local intranet 100%

Procedure 12: Review possible matches and click ACCEPT button.

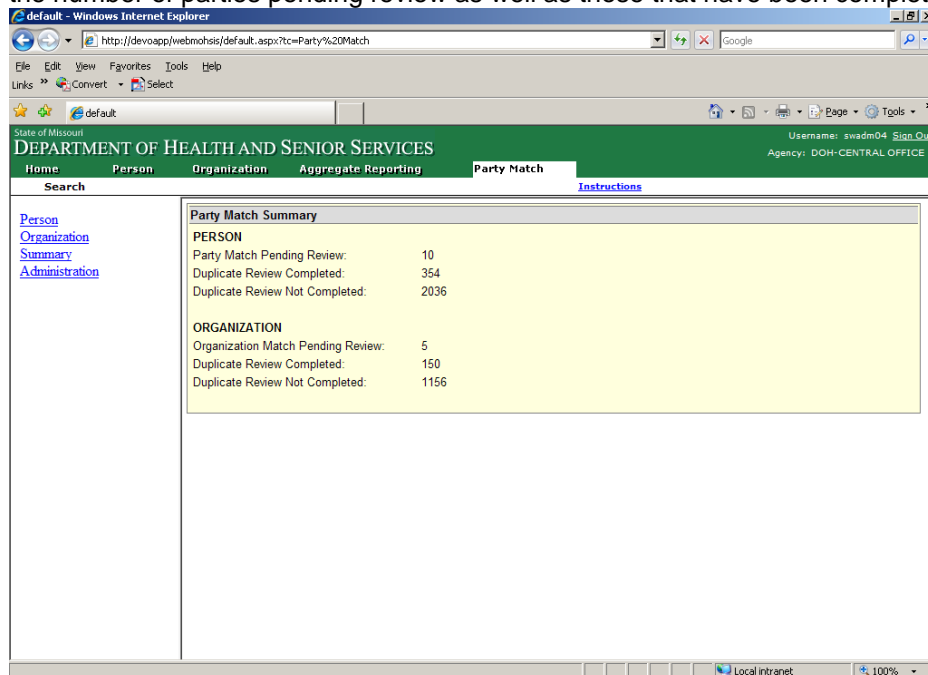
Expected System Response: The Organization Possible Matches Screen is returned. (The record is accepted and removed from the screen.)



## SUMMARY

Procedure 13: Click Summary in the Treeview.

Expected System Response: The Party Match Summary Page is returned. This page can be used to see the number of parties pending review as well as those that have been completed or not completed.



## ADMINISTRATION (Admin Users Only)

Procedure 14: Click Administration in the Treeview.

## WEBSURV TEST

Expected System Response: The Party Match Administration Screen is returned.

The screenshot shows a web browser window with the URL <http://devvoapp/webmohsis/default.aspx?tc=Party%20Match>. The page header includes the State of Missouri logo and the text "DEPARTMENT OF HEALTH AND SENIOR SERVICES". The navigation menu has links for Home, Person, Organization, Aggregate Reporting, and Party Match. The Party Match section is active, showing a "Party Match Administration" form. The form has a "Party Type" dropdown menu and a "Count" dropdown menu. The "Add records" button is visible. The left sidebar contains links for Person, Organization, Summary, and Administration. The bottom status bar shows "Local intranet" and "100%".

Procedure 15: Select PERSON in the Party Type dropdown, and select Count. Click Add records. COUNT determines the number of records that will be REVIEWED for possible matches.

Expected System Response: The screen is returned with message that "Add records successful". You can check the Summary count to see the number of pending matches.

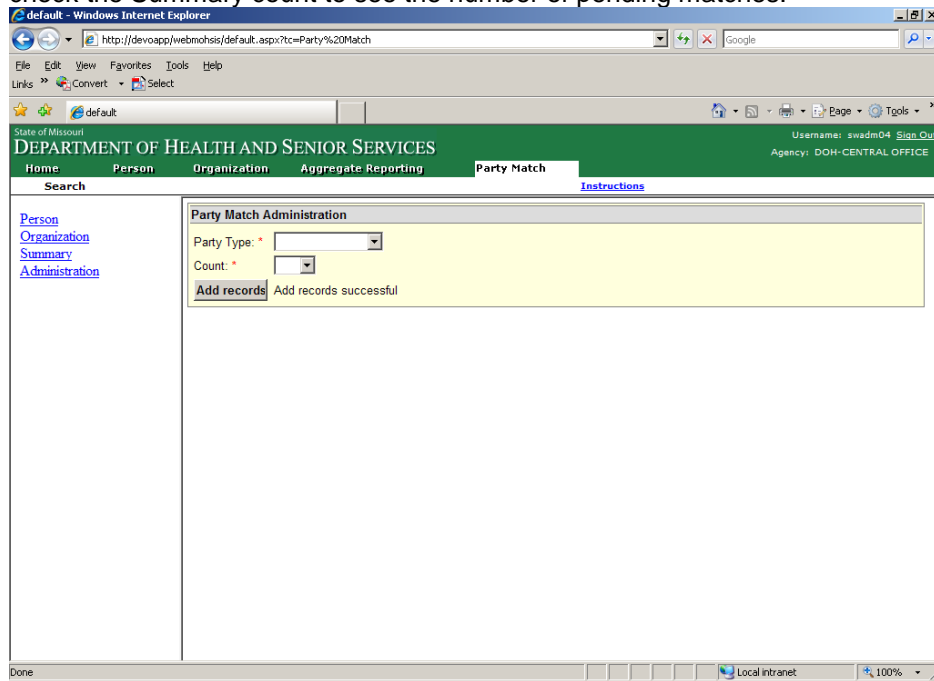
This screenshot is similar to the previous one, but it shows the "Add records" button with the text "Add records successful" next to it. The "Party Type" dropdown is set to "PERSON" and the "Count" dropdown is set to "Count". The left sidebar and navigation menu are the same as in the previous screenshot. The bottom status bar shows "PartyMatchAdmin.aspx" and "Local intranet".

Procedure 16: Select ORGANIZATION in the Party Type dropdown, and select Count. Click Add records. COUNT determines the number of records that will be REVIEWED for possible matches.



## WEBSURV TEST

Expected System Response: The screen is returned with message that “Add records successful”. You can check the Summary count to see the number of pending matches.



Test Complete